

EPEM

Harbor Emerging Markets Equity ETF

Fund Description

EPEM is actively managed, focusing on emerging markets equities with strong fundamentals and undervalued opportunities. The fund aims for long-term total return.

FactSet Analyst Report

EPEM typically holds between 40 and 70 companies across various market caps, primarily in emerging markets. It invests in equities such as common stocks, preferred shares, and other securities with equity-like features. The fund uses a bottom-up approach, selecting firms with strong fundamentals like revenue growth, profit margins, and cash flow, which may be undervalued by the market. The fund's sub-adviser employs statistical analysis and considers ESG factors to manage risk and seek better returns. Securities are weighted based on their individual outlooks, and stocks are sold when they reach targets, show deteriorating fundamentals, or more attractive opportunities arise. Its main goal is to generate long-term total return.